# Introduction to A2J Authoring

a2j Access To Justice
AT CHICAGO-KENT COLLEGE OF LAW

**Rachel Medina**

Manager

The Center for Access to
Justice & Technology,
Chicago-Kent College of Law

Chicago-Kent
College of Law
ILLINOIS INSTITUTE OF TECHNOLOGY

a2j The Center for
Access to Justice & Technology
AT CHICAGO-KENT COLLEGE OF LAW

---

## Introduction & Overview

➢Introduction to the uses of A2J Guided Interviews, including:
- ➢document assembly;
- ➢website guide; and,
- ➢case management system data collection

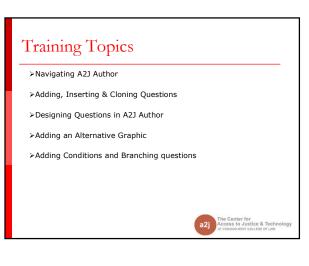➢Brief overview of the mechanics of building an A2J Author Guided Interview, including:
- ➢planning your interview;
- ➢creating a flowchart of questions;
- ➢designing a question; and,
- ➢making the best use of just-in-time learning features.

➢"Tips" & Q&A

a2j The Center for
Access to Justice & Technology
AT CHICAGO-KENT COLLEGE OF LAW

---

## Training Topics

➢Navigating A2J Author

➢Adding, Inserting & Cloning Questions

➢Designing Questions in A2J Author

➢Adding an Alternative Graphic

➢Adding Conditions and Branching questions

a2j The Center for
Access to Justice & Technology
AT CHICAGO-KENT COLLEGE OF LAW

## Meeting the Needs of Self-Represented Litigants: A Consumer Based Approach

- Problem: huge upsurge of self-represented litigants flooding the court system
- Partners:
  - National Center for State Courts
  - Illinois Institute of Technology
    - Institute of Design
    - Chicago-Kent College of Law
  - State Justice Institute, Open Society Institute, Center for Access to Courts through Technology

a2j The Center for Access to Justice & Technology
AT CHICAGO-KENT COLLEGE OF LAW

---

## A Consumer Based Approach: Research

- **Identify the major barriers to access to justice by litigants without lawyers**
  - Ethnographic research in 5 courts, California, Delaware, Colorado & Illinois

- **Key Insight**
  - The simple act of filling out forms raises unique challenges that the many low-income self-represented litigants have trouble overcoming

ACCESS TO JUSTICE
Meeting The Needs Of Self-Represented Litigants

Charles L. Owen
Distinguished Professor
of Design

Ronald W. Staudt
Associate Vice President,
Law, Business and Technology
and Professor of Law

Edward B. Pedwell
Manager, Justice Web
Collaboratory

Institute of Design and
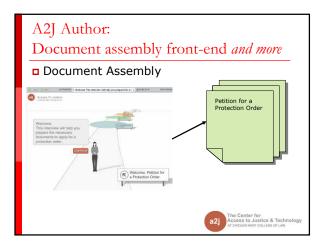Chicago-Kent College of Law
Illinois Institute of Technology

---

## A2J Author (2004...*present*)

- Prototype: A custom designed software that provided a web-interface for pro se litigants to complete forms was developed

- A2J Author –
  - a factory or a software machine to make front-ends for court forms at a very low cost.
  - Allows authors to easily create A2J Guided Interviews on their own

a2j The Center for Access to Justice & Technology
AT CHICAGO-KENT COLLEGE OF LAW

**A2J Author:**
**Document assembly front-end** *and more*

□ Document Assembly

Petition for a Protection Order

Welcome. Petition for a Protection Order.

The Center for Access to Justice & Technology
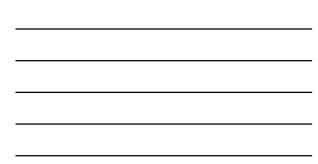AT CHICAGO-KENT COLLEGE OF LAW

---
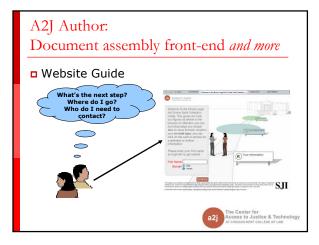
**A2J Author:**
**Document assembly front-end** *and more*

□ Document templates created in HotDocs (uploaded to NPADO)

□ A2J Guided Interviews created in A2J Author (uploaded to NPADO to correspond with HotDocs template)

□ NPADO returns a link which can be placed on state's legal aid website

□ End-users select the link to launch interview

□ Data (.anx file) submitted back to server to compile with corresponding HotDocs template

□ NPADO returns completed document

LEXISNEXIS
HotDocs
OnLine

XML    A2J

Customer Data

Completed Document

Local Terminal

---

**A2J Author:**
**Document assembly front-end** *and more*

□ Website Guide

What's the next step? Where do I go? Who do I need to contact?

SJI

The Center for Access to Justice & Technology
AT CHICAGO-KENT COLLEGE OF LAW

## A2J Author:
### Document assembly front-end *and more*
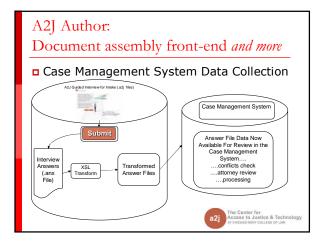
☐ Case Management System Data Collection



---

## Building A2J Author Guided Interviews

- Planning your interview
- Creating a flowchart of questions
- Designing a question
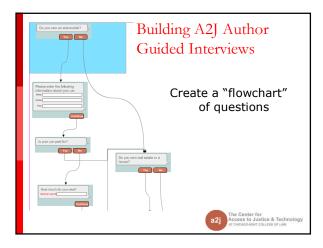- Making the best use of just-in-time learning features

---

## Building A2J Author Guided Interviews

☐ Planning your interview
  - Become familiar with the form
    ☐ What are the qualifications?
    ☐ What are the contingencies?
    ☐ What types of data will need to be collected?
    ☐ Is the data logically categorized on the form?
      - If not, think about ways you can categorize the data you will collect in the interview in order to make it more user friendly!
  - Which comes first: HotDocs or A2J Author?
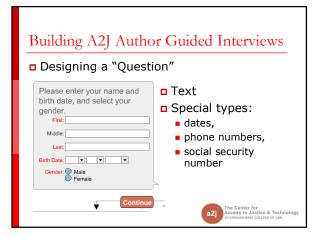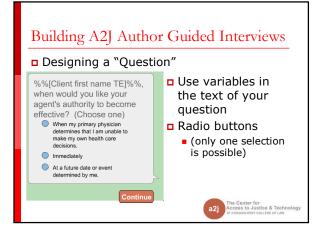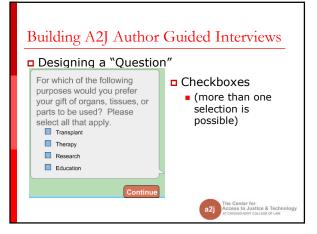  - Start Authoring!

**Building A2J Author Guided Interviews**

Create a "flowchart" of questions

---

**Building A2J Author Guided Interviews**

□ Designing a "Question"

Please enter your name and birth date, and select your gender.

First:
Middle:
Last:
Birth Date:
Gender: ○ Male ○ Female

Continue

□ Text
□ Special types:
  ▪ dates,
  ▪ phone numbers,
  ▪ social security number

---

**Building A2J Author Guided Interviews**

□ Designing a "Question"

%%[Client first name TE]%%, when would you like your agent's authority to become effective? (Choose one)

○ When my primary physician determines that I am unable to make my own health care decisions.
○ Immediately
○ At a future date or event determined by me.

Continue

□ Use variables in the text of your question
□ Radio buttons
  ▪ (only one selection is possible)

## Building A2J Author Guided Interviews

□ Designing a "Question"

For which of the following purposes would you prefer your gift of organs, tissues, or parts to be used?  Please select all that apply.

☐ Transplant
☐ Therapy
☐ Research
☐ Education

**Continue**

□ Checkboxes
  ■ (more than one selection is possible)

a2j — The Center for Access to Justice & Technology — AT CHICAGO-KENT COLLEGE OF LAW

---

## Building A2J Author Guided Interviews

□ Making the best use of "just-in-time" learning features
  ■ "Learn More"
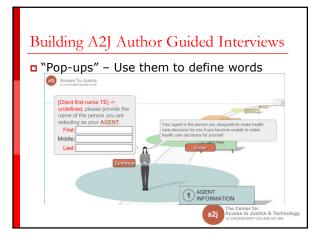    □ Put yourself in their shoes
      ▪ Will they remember the zip code for their employer?
  ■ "Pop-ups"
    □ Define difficult words
  ■ Hyperlinks
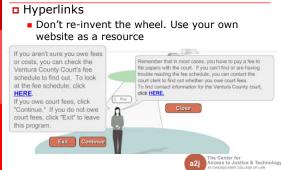    □ Don't re-invent the wheel. Use your own website as a resource.

a2j — The Center for Access to Justice & Technology — AT CHICAGO-KENT COLLEGE OF LAW

---

## Building A2J Author Guided Interviews

□ "Learn More"
  ■ Put yourself in their shoes
    □ Will they remember the zip code for their employer?

What if I do not know the zip code?

**Learn More**   2  DO YOU AGREE?

You may search for the zip code by clicking here.

DO YOU AGREE?

**Close**

a2j — The Center for Access to Justice & Technology — AT CHICAGO-KENT COLLEGE OF LAW

## Building A2J Author Guided Interviews

◻ "Pop-ups" – Use them to define words



## Building A2J Author Guided Interviews

◻ Hyperlinks
- ▪ Don't re-invent the wheel. Use your own website as a resource



## Tips

◻ Don't over plan:
- ▪ 1) big picture;
- ▪ 2) lay out the Steps; and
- ▪ 3) GO!

◻ Organize as you go
- ▪ use your steps and flowchart to help you

◻ Always keep your audience in mind:
- ▪ 1) keep it simple; and
- ▪ 2) offer links to look up zip codes, counties, phone numbers…

## Tips

- Before uploading, don't forget to "clean up" your variables

- In A2J Author "Multiple choice" questions use True/False variables for each choice; make sure the HotDocs variables comport with that structure

- Time spent collecting feedback/comments = Development Time x 2; Plan accordingly

**a2j** The Center for
Access to Justice & Technology
AT CHICAGO-KENT COLLEGE OF LAW